



srg

ASTA | **THE FLAVOR IMPERATIVE**

KARA NIELSEN | THE STERLING-RICE GROUP

APRIL 2015



THE FLAVOR IMPERATIVE

Highly Seasoned Snack Foods



Cheetos Sweetos Cinnamon Sugar Puffs

Craveable Fast-Food Flavors



Taco Bell Sriracha Menu

Intricately Spiced Global Convenience Meals



Jennifer May

Maya Kaimal Coconut Chicken Curry at Costco

Sweet & Savory Bars



Mediterra Bars

Spicy, Layered, Creative Cocktails



The Gin Joint, Charleston, S.C.

Millennials Driving Flavor Trends



Millennials: The Largest Generation

Most Diverse Generation



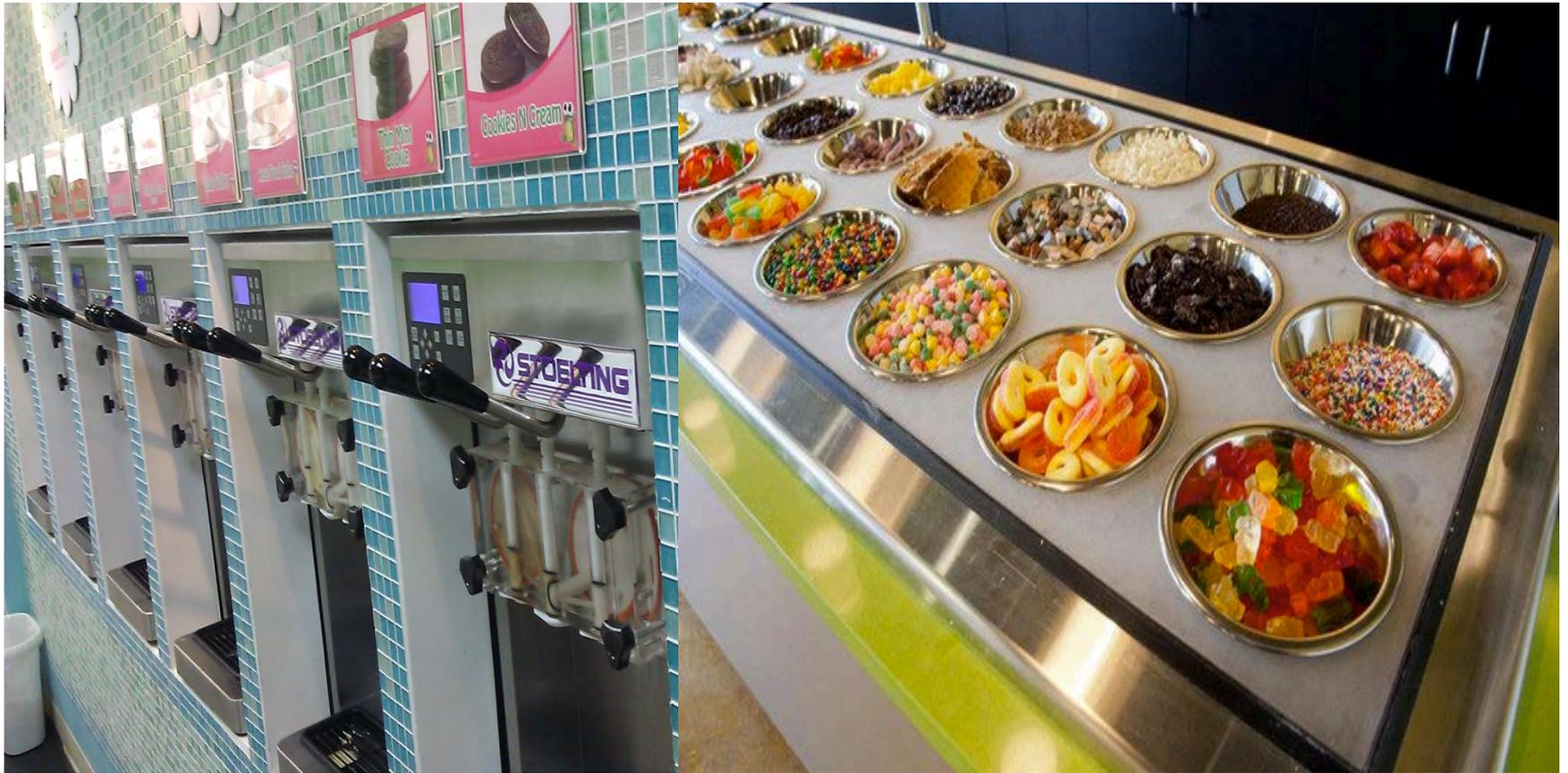
Millennial Cohort: 43% Non-White

Millennial Taste Buds: A Marketing Target



New Red Bull Editions

Millennials Accustomed to Flavor Choices



Self-Serve Yogurt Bars

What's Coming Next?





CULINARY TRENDS AND DRIVERS

We know food inside and out.

- **70% Food Project Focus**
- **In-House Culinary Expertise**
- **Culinary Intellectual Property & Thought Leadership**
- **Commercial Culinary Center**
- **Product Development Capabilities**



srg culinary shifts 3.0™

Evolving Consumer Drivers





srg LIFEDRIVERS™

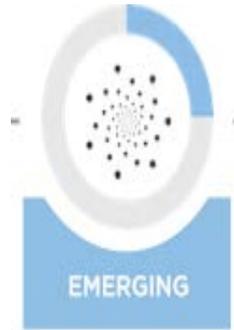
EMPOWERMENT | ACHIEVEMENT | RESPECT | PERSPECTIVE | INTEGRITY | BELONGING | RELEASE | JOY

srg culinary shifts 3.0™

Trends



Measuring Trend Maturity



- Fine dining
- Specialty food
- Gourmet magazines



- Chain restaurants
- Food TV
- Natural channel



- Heading toward mainstream
- Women's magazines/Allrecipes or BHG
- Broader media



- Mass grocery retail
- Fast foodservice

SRG's 2015 CULINARY TRENDS

sr_g culinary shifts 3.0™



STERLING-RICE GROUP'S YO CUTTING-EDGE CULINARY TRENDS FOR 2015

We are harnessing sophisticated flavors here in the U.S., discovering delicious foods from every part of the world. Technology has helped, as has the entrepreneurial millennial generation. In 2015, expect to see deeper explorations of global cuisines and cooking methods, especially Asian; continued efforts to reinforce community connections and adopt buying habits that promote sustainability; and new foods and flavors that meet our demand for balanced nutrition as well as adventurous, novel, "bleeding" eating experiences.

ADVANCED ASIAN

Get ready for more complex and top-to-region Asian foods for 2015. The spice and flavor here opens up the "advanced" Asian food scene and goes beyond the usual, the basic, and the familiar. Thanks to a growing group of Asian inspired restaurateurs, appreciative diners are discovering Northern Italian. This cuisine, Japanese chamomile porkchop, and the tangy flavors of Hoopai foods.

WHO'S DOING IT NOW:

- The Fat Duck, Los Angeles; Hight + Market Long, Los Angeles
- Almondjoli (Pablo, Honolulu); Bar Chalk, Brooklyn
- Filipino Lumpia Shack Snacks, New York City

MATCHA MADNESS

In 2015, our quest for vitality will lead to superior matcha, a nutrient powerhouse green tea being the market in tomorrow's brands. Made from roasted green tea leaves, matcha is becoming more associated, it's healthy, and it's caffeine. Your year's go-to energy and wellness beverage isn't a calming energy with less caffeine than green tea, but with more nutrient benefits.

CHECK OUT:

- Higgs Organic Matcha
- Monks Sparkling Matcha Tea
- In-Fu Matcha Luv
- MatchaMe Brooklyn

CANNABIS CUISINE

Being in Boulder gives SRG unique insight into the, uh, budding edible marijuana trend. Going beyond pot brownies, today's edibles come in many forms, including confections, bars, simple sprints, and even infused rice-kernel coffee. Cookbooks, cooking classes, and online courses legitimize the burgeoning industry, which already has a food truck.

WHO'S DOING IT NOW:

- Mirth Provisions legal, risk-based coffee
- Craft Elixirs Raveend THC oil infused simple syrup
- Sunch Food Truck from MagnoliaFarm.com

HOP-FREE SUDS

Cracking the base of this brewer is taking a cue from their medical professionals and using herbs, spices, and other bitter plants to replace hops balance and aroma to be instead of hops. These associations, in green, include chamomile, lavender, rosemary, tea, being, and even citrus oils, yielding intriguing flavors instead of hoppy bitterness.

OR ONE THERE:

- New Belgium Brewing Company: Fruit - farmhouse, big myrtle, jammy, elderflower
- Earth Eagle Brewing: Vint, Forest Fruit - wild grapes, rosemary, lemon juice
- Cambridge Brewing Company: Heather Ale - Scottish floor malting barley, leecher, seaweed

INCENDIARY CHARCOAL

Thanks to the rise of grilled Asian foods, more chefs are turning to ancient styles of charcoal. Japanese charcoal, or shichirin, is made with that famous 100% 100% rice, and is made in a way that allows food to cook low and retain natural flavors. This charcoal performs a similar feat: beyond the grill, charcoal is also coloring details, cookies, taramasalas, and even beauty products.

HEAT THE BURN:

- Sun Baked Bar, Chicago
- Charcoal Restaurant, Denver
- Puk Puk House Thai Style Charcoal Lopp
- Hira English Charcoal Squares, the Home Cheese Company

LOCAL GRAIN NETWORK

Regional grain economics are growing with farmers causing small scale alternative grain varieties and selling them to local bakeries, breweries, chefs, and processors, who are in turn using mills to grind fresh flour for bread, pizza, and pastas. Will more farmers' markets selling locally grown grain, expect a bigger demand for counter-top mills, grain-milling appliances, and products made from fresh-milled flour in 2015.

TRY SOME:

- Chicago: Mill/Line restaurant; Baker Millie Bakery and Millhouse
- Community Grains Flour and pasta
- Wolfgang Grain Mill, Vitana Dry-Lawn Casterbar

COCONUT SUGAR SWEETNESS

Sugar is in the doghouse these days and has many graduating students this year. Sweeteners like coconut sugar, Made from natural Monstera leaves, it has a lower glycemic index than white sugar, and many nutrients, adding a sweet hint to granolas, confections, and spreads to the natural channel. Coconut sugar also appears to be healthy, and has been linked to making healthier Asian recipes.

TASTE SOME:

- Honey Elizabeth Ancient Grain Granola
- Kiki's Treats Salted Caramels
- Higgs Foods Chocolate Spreads

FARM TO TABLE KOSHER

Looking to eat in a more sustainable, conscious, and cultural way, millennial lives are starting to keep kosher, supported by a rise in small businesses offering better tasting, better sourced, and more varied kosher fare. There include artisan, Jewish delis, handcrafted baps, shops, and restaurants that also appeal to non-Jews attracted to food that seems cleaner and pure.

WHO'S DOING IT NOW:

- Los Angeles: Dimesa Kitchen & Cocktails; Weiler's Deli
- New York City: Bunk & Doughnuts Cafe; Birk's Seed Ragi
- Grey & Betford Kasher Pastured Meats

HUNGER GAMES: RESTAURANT EDITION

What combines communal dining, pop-up restaurant novelty, chef competitions, and crowd sourced creativity? It's 2015's newest restaurant concept, incubators that support aspiring chefs with kitchens, dining space, and marketing power. Diners vote with their forks.

WGET:

- Kitchen 1213, Dallas: features chef's houses through social media
- Eat/Place, Washington, D.C.: four-month store in a historic new house
- Avenue Food & Beverage, Denver: opening in 2015, 24-hour opening mornings in shopping restaurants

UGLY FRUIT AND VEGETABLE MOVEMENT

In line with growing concerns over food waste, this French-born brand gives misshapen and funny-looking produce a place at the table and in recipes where looks don't matter.

"People around the globe are willing to find new ways to reduce food waste. There are already underway here to give businesses in this space and to find resourceful ways to manage our food supply and feed the hungry at the same time"

- Kara Nelson, Ugly Grocery Director

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Headquartered in Boulder, Colorado, Sterling Rice Group (SRG) is a nationally recognized brand-building firm specializing in consumer insights, business strategy, innovation, advertising, and design. SRG has a deep expertise in food and beverage, and promotes the growth of living well brands that make people's lives healthier and happier. SRG is a member AdAge Small Agency of the Year, has been named by *Entrepreneur Magazine* as one of the Best Places to Work for the last four years, and has been issuing impact for clients for 20 years.





GLOBAL *embrace*

With multiculturalism firmly in place, we explore, engage in and celebrate culinary diversity in more inclusive ways.

Global Flavor Spectrum: THAI FLAVORS



LAN LARB SOHO, NYC
 Flavors: Fish sauce, chiles, tamarind, lime juice, makrut leaf, coriander



EVOL THAI STYLE CURRY CHICKEN
 Flavor: Yellow curry



SWANSON THAI GINGER BROTH Flavors: Coconut, lemongrass, ginger, cilantro



FRESH-TO-GO THAI SALAD
 Flavor: Peanut



THAI SCONE

Craftsman & Wolves, S.F.

Flavors: Candied ginger, dried mango, coconut, green curry



THAI BASIL SANGRIA

Food & Wine Magazine

Flavors: Thai Basil



THAI CURRY PEANUT BRITTLE

Morning Glory Confections, L.A.

Flavors: Chiles, curry, peanuts



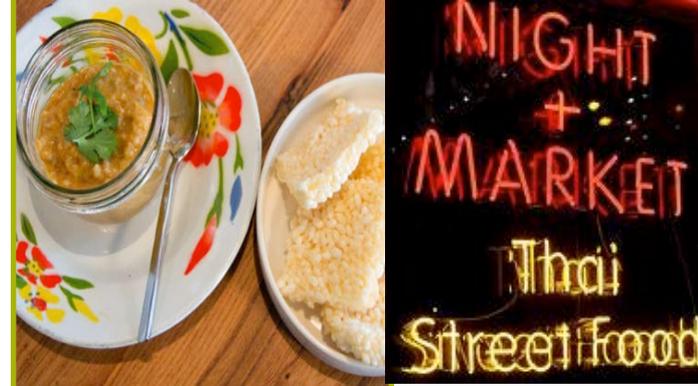
2015: Advanced Asian

Digging deeper into regional Asian cuisines

- New forms of Thai - Northern/Issan; street foods
 - Night + Market, L.A.; Hawker Fare, Oakland; Kin Khao, S.F.
- More Filipino dishes and flavors
 - Lumpia Shack Snackshop, N.Y.C.; food trucks
- Japanese variety
 - Matcha green tea; ramen, dashi; okonomiyaki; tonkatsu

Flavor Ingredients:

- Spices & Peppers: Five spice powder, Sichuan peppercorns, shichimi togarashi, Thai chiles
- Aromatics: Ginger, lemongrass, tamarind; Filipino: vinegar + soy, garlic
- Herbs: Thai basil, pandan leaf, mint, cilantro
- Fruit: Yuzu, makrut (kaffir) lime, lychee, mango
- Coconut, peanuts, coconut sugar



Southeast Asian Flavor Stars



Pandan Leaf



Lemongrass



Tamarind



Makrut (Kaffir) Lime



Lychee

Rambutan

Longan



PANDAN LEAF LATTE
Cognoscenti Coffee, L.A.



PANDAN MACARONS
Boba Guys, S.F.



PANDAN COCKTAIL
Mace, N.Y.C.

North Asian Flavor Stars



Yuzu Fruit



Matcha Green Tea



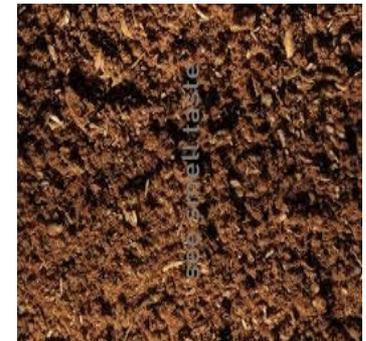
Persimmon



Umeboshi – Pickled Plum



Shichimi Togarashi: chile flakes, black pepper, Sichuan peppercorns, sesame seeds, orange peel, seaweed, ginger



Five Spice Powder: Star anise, cloves, cinnamon, Sichuan pepper, fennel



GREEN TEA NOODLES

Sprinkled with matcha
Mission Chinese, N.Y.C.



MOTTO

Sparkling Matcha Tea
Matcha, apple cider vinegar,
honey, agave, lemon juice



**CHURROS WITH MATCHA
DIPPING SAUCE**

El Capitan, S.F.



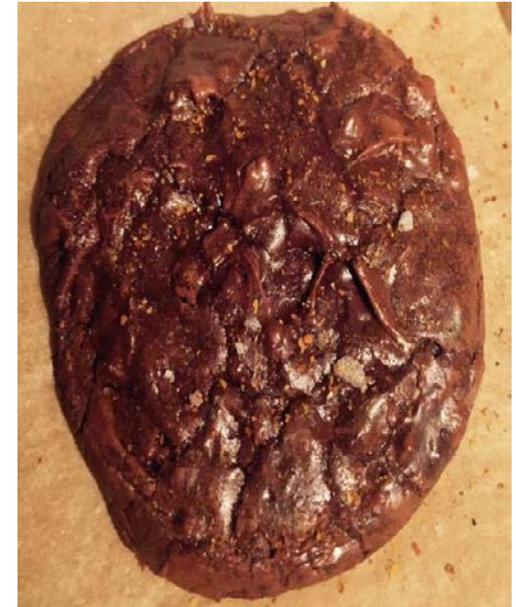
TOGARASHI POPCORN

Liholiho Yacht Club, S.F.



THE DEATH KNELL COCKTAIL

Japanese whiskey, Oloroso
sherry, togarashi
The Dead Rabbit, N.Y.C.



**CHOCOLATE TOGARASHI
COOKIE**

Press 12 Bakery, S.F.



Middle Eastern

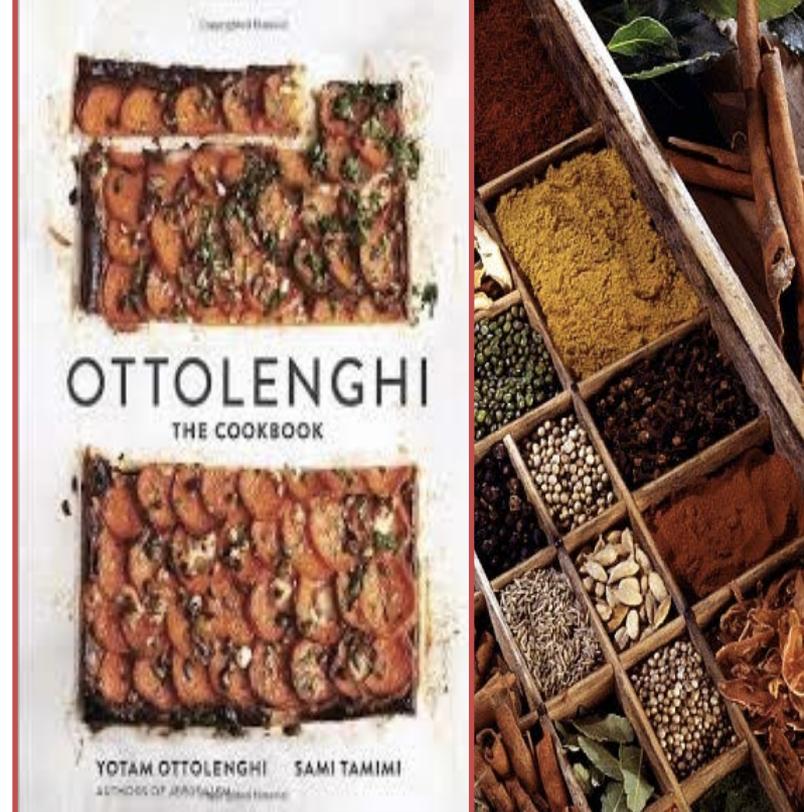
Aromatic Discovery

Spices, spice blends, familiar yet still exotic ingredients come together in a flavorful and healthful cuisine

– Drivers: Yotam Ottolenghi restaurants, cookbooks; celebrated spice merchants – La Boîte, N.Y.C.; See-Smell-Taste, S.F.

Flavor Ingredients:

- Spices & Blends: Saffron, sumac, cumin, cinnamon, ras al hanout, za'atar, cardamom
- Aromatics: Rose water, orange water, sesame seeds, walnuts, pistachios
- Herbs: Mint, parsley, basil, oregano
- Fruit: Figs, pomegranate, dates, barberries, preserved lemons, golden raisins, mulberries, sour cherries, plums
- Sweet: Honey, date syrup, pomegranate molasses



Middle Eastern Flavor Stars



Labne with za'atar



Meringue, rose, cherry



Saffron rice, barberries,
pistachio, dill, tarragon



Za'atar:

Sesame seeds, thyme,
sumac, salt and maybe
cumin, oregano, fennel



Cardamom



Pomegranate syrup



Mulberries



Ras el Hanout:

Cumin, cinnamon, clove,
nutmeg, allspice, turmeric,
ginger, fennel



**SWEET POTATO SOUP WITH
FENNEL & ZA'ATAR OIL**

Food 52 blog



**CHICKPEA HUMMUS SALAD
SANDWICH**

Wichcraft Restaurants
– with tahini, mint and za'atar



**ROASTED CARROTS WITH
ZA'ATAR**

Food Network Magazine



TURKISH BREAKFAST

Afar Magazine, March 2015
Turkey a big travel destination



TURKISH COFFEE MACARON

Hungry Heart Bakery, Portland
Cardamom, cinnamon dusted;
espresso ganache



CHOBANI TURKISH SIMIT SANDWICHES

Chobani SOHO Shop
Also: Turkish Red Lentil Soup with
Aleppo Pepper



GLOBAL

embrace

To add meaning to our lives and transcend the flimflam, we search for culinary expressions that are grounded in tradition, heritage and true passion.



New Nordic

Clean, foraged flavors

Noma in Copenhagen kicked off a trend, building on foraged, seasonal ingredients

- Aska, Aquavit, Skal – New York
- Trillium, Denver; The Bachelor Farmer, Minneapolis – Nordic by way of the Midwest
- Andra Loft & Bar – Seattle, by Tom Douglas

Flavor Ingredients:

- Spices: Juniper, cardamom, cinnamon, ginger, nutmeg, allspice, mace, anise, cumin, coriander
- Herbs: Dill, parsley, sorrel, seaweed, moss
- Aromatics: Hay, pine, rye, lichen, whey
- Fruit: Cloudberry, lingonberry, red currants, elderberry, wild strawberries, rhubarb, sea buckthorn
- Dairy – cultured butter, buttermilk, sour cream; pickling; smoke

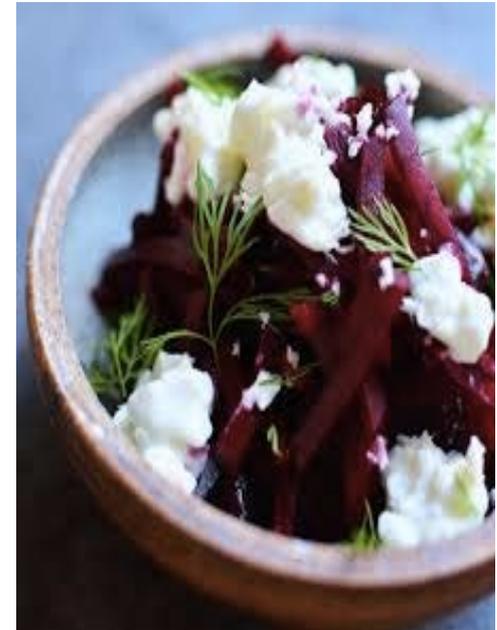




Cloudberry



Rye bread



**Beets, horseradish, cottage
cheese, dill**



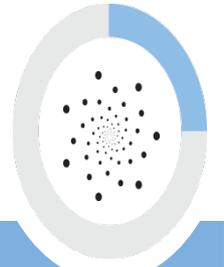
Lingonberry



Juniper berries



Eggs on Hay



EMERGING



SWEDISH MEATBALLS

Ändra Loft & Bar, Seattle -
from Tom Douglas



EXPANDING



**LINGONBERRY
CROISSANT**

Atlanta Bread Co.

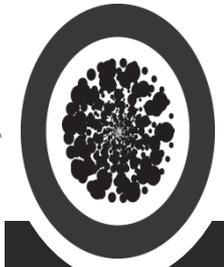


MAINSTREAMING



AEBELSKIVERS

Allrecipes.com
Scandinavian baked goods
most popular here



ARRIVED



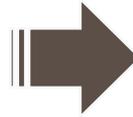
**IKEA SWEDISH
MEATBALLS**

So What's Driving **New Nordic**?



PERSPECTIVE

Exploration
World Awareness
Self-Knowledge
Balance



ACHIEVEMENT

Determination
Goals
Success

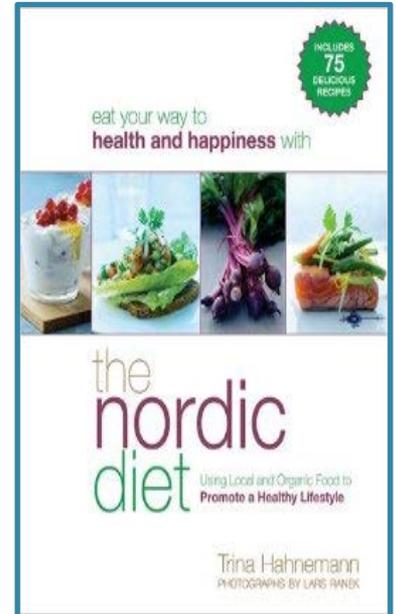
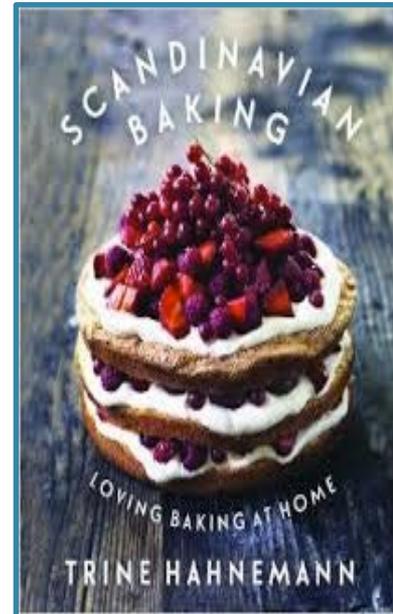


INTEGRITY

Honesty
Loyalty
Authenticity



Nordic/Scandi Style Spreads Out



Books, Studies, Danish Ministry Promoting Nordic Diet

Ministry of Food,
Agriculture and Fisheries
of Denmark



Guidelines for the New Nordic Diet:

1. More fruit and vegetables every day
2. More whole-grain produce
3. More food from the seas and lakes
4. Higher-quality meat, and less of it
5. More food from wild landscapes
6. Organic produce whenever possible
7. Avoid food additives
8. More meals based on seasonal produce
9. More home-cooked food
10. Less waste





The logo consists of the word "GLOBAL" in a light green, sans-serif font. The letter "O" is replaced by a green globe showing the Americas, enclosed in a dashed white circle. Above the globe is a yellow airplane icon. Below "GLOBAL" is the word "embrace" in a blue, cursive script font.

GLOBAL *embrace*

We are on an unparalleled quest to excite our senses via new heights in flavor, texture, aroma and taste.

Mexican Vanilla



Papua New Guinea Vanilla



Indonesian Vanilla



Madagascar Vanilla



VARIETAL VANILLA

Choctál Single-Origin Vanilla Ice Creams

Elevated Flavors Growing on Menu



SMOKED PAPRIKA

- 207% – 4-yr. menu penetration growth, Datassential MenuTrends
- CPK – Cedar Planked Salmon



HARISSA

- 180% – 4-yr. growth
- Le Pain Quotidien – Harissa Sauce
- Cheesecake Factory – Moroccan Chicken



TURMERIC

- 200% – 4-yr. growth
- Popular in pressed juices
- Kale Me Crazy, Atlanta – The Painkiller – ginger, lime, turmeric, raw honey

South African Seasoning on the Rise



“FROM BBQ TO BRAAI”

Promotional grilling event sponsored by Wines of South Africa

Spice Route influence: coriander, cumin, turmeric, curry, cinnamon



NANDO'S PERI PERI CHICKEN

South African chicken chain expanding into U.S., finally!

New stores opening in Chicago; already in D.C.



SOUTH AFRICAN CHIPS

Trader Joe's – introduced Fall 2014; building on braai

Smoked paprika, chile pepper, salt, garlic, basil, parsley

Wrap-Up: Going Forward

- **Millennials:** demanding big flavor forever
- **Generation Z:** empowered cooks
- **Multi-cultural society:** growing in U.S.
- **Natural food industry:** more flavor- forward than conventional; growing fast
- **Foodservice expansion** not stopping
- **Online** groceries; delivered **meal services**
- **Health & wellness:** natural wisdom built on spices – cinnamon, turmeric, ginger





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